

Offeror's Conference Eastern District of Missouri
August 3, 2009
9 a.m. - 11 a.m.

Presented by DATM Nicole Vernier-Gelven

1) Introduction

- Greeting by Chief U.S. Probation Officer Douglas W. Burris
- This conference is being audio recorded and a clip will be posted to the web site, thereby available to all vendors at a later date.
- Representatives from the Administrative Office in Washington D.C., are on-call, in the event that further clarification pertaining to the RFP is needed.
- Explain the roles/responsibilities of the U.S. Probation Office and the U.S. Pretrial Services Office within the Federal Court process.
- Introduction of Treatment Team

2) Solicitation Process

- Defined catchment areas, BPAs, and # of possible awards:
 - 0865-10-01 - Substance Abuse Treatment for St. Louis City and St. Louis County (1-3 vendors)
 - 0865-10-02 - Substance Abuse Treatment for St. Charles, Lincoln, and Warren Counties (1-2 vendors)
 - 0865-10-03 - Drug Testing Collection for St. Louis City and St. Louis County (1-3 vendors)
 - 0865-10-04 - Drug Testing Collection for St. Charles, Lincoln, and Warren Counties (1-2 vendors)
 - 0865-10-05 - Methadone Maintenance and Detox for St. Louis City, St. Louis County, St. Charles, Lincoln, Warren, and Jefferson Counties (1-2 vendors)
 - 0865-10-06 - Outpatient Detoxification/Antagonist Treatment for St. Louis City, St. Louis County, St. Charles, Lincoln, Warren, and Jefferson Counties (1-2 vendors)
 - 0865-10-07 - Manualized Cognitive Behavioral Group for St. Louis City, St. Louis, and St. Charles County (1-3 vendors)
 - 0865-10-08 - Mental Health Treatment for St. Louis City and St. Louis County (1-3 vendors)
 - 0865-10-09 - Mental Health Treatment for St. Charles, Lincoln, and Warren Counties (1-3 vendors)
 - 0865-10-10 - Integrated Treatment Services for Co-Occurring Disorders for St. Louis City and St. Louis County (1 vendor)
 - 0865-10-11 - Therapeutic Community Treatment for the Eastern District of Missouri (1-2 vendors)
 - 0865-10-12 - Residential Treatment for the Eastern District of Missouri (1-4 vendors)
 - 0865-10-13 - Sex Offender Treatment for St. Louis City and St. Louis County (1-2 vendors)
 - 0865-10-14 - Sex Offender Treatment for St. Charles, Lincoln and

- Warren Counties (1-2 vendors)
 - 0865-10-15 - Sex Offender Treatment for Jefferson, Washington, St. Francois and Ste. Genevieve Counties (1-2 vendors)
 - 0865-10-16 - Sex Offender Treatment for Gasconade, Franklin, Maries, Phelps, Crawford and Dent Counties(1-2 vendors)
 - 0865-10-17 - Polygraph Providers for the Eastern District of Missouri (1-2 vendors)
 - 0865-10-18 - Mental Health Treatment for Jefferson County (1 vendor)
- Explain piggybacking and that Pretrial would be utilizing Probation's BPAs. Also Bureau of Prisons could piggyback on some of the contracts; however, that has not been specifically identified. For the most part, the Bureau of Prisons will be soliciting for their own purchase agreement and may piggyback until then. The U.S. Probation Office will oversee all the Blanket Purchase Agreements (BPA) awarded during this solicitation.
- EMQs (estimated monthly quantities) determined through analysis of approximately the past 12 months of services due to budget fluctuations; also received feedback from supervision officers to determine needed treatment.
EMQs include projected numbers for Probation, Pretrial, and BOP (if applicable)
- Any questions pertaining to the RFP must be e-mailed to [Nicole Vernier-Gelven@moep.uscourts.gov](mailto:Nicole_Vernier-Gelven@moep.uscourts.gov) on or before August 10, 2009, by 4:00pm. Any e-mailed questions and responses will be posted to the website for the benefit of all vendors. No questions will be accepted after the deadline on August 10.
- RFPs need to be returned in a sealed envelope to the U.S. Probation Office, 4300 Goodfellow Blvd., Bldg #107, St. Louis, MO 63120, attn: Nicole Vernier-Gelven, no later than August 17, 2009, by 3:30pm. Must submit an original and two copies.
- The vendor should submit under *separate* sealed envelope each BPA the vendor is interested in submitting an RFP. The vendor must submit a complete package for each BPA, specific for that BPA, or the vendor will be technically unacceptable.
- Site visits would be scheduled and conducted with the lowest priced/technically acceptable bidders.
- Vendors that are not selected will be notified by mail.
- There could be more than one vendor selected for each BPA. If more than one vendor is selected referrals are rotated between vendors to ensure financial equity.

3) **Section B - Supplies or Services & Offeror's Prices**

- Vendor must be capable of providing all services specifically requested in Section B. Vendor will be technically unacceptable if they are unable to provide for one of the project codes identified for that BPA.

- Transportation and emergency financial assistance on all BPAs. If no access to public transportation, describe how the offeror will provide this service. Emergency financial assistance (typically medical expenses or meds).
- Contractor's Local Travel is utilized when the vendor has to transport an offender, or if upon request of the Probation Office, the vendor drops off urine specimens at the Probation Office.
- Vendor needs to collect co-payment as instructed on the program plan.

4) Section C-Statement of Work

- Section "C" contains the minimum mandatory requirements that need to be met by the vendor to be deemed technically acceptable. Not addressing all areas or not meeting the minimum mandatory requirements will deem the proposal technically unacceptable.
- Specifically review section regarding sweat patch invoicing - invoice upon removal, and base prices accordingly.
- Refer to staff qualifications set forth in Section C, and complete Attachment C accordingly.
- Local Services for project codes with an asterisk * are located on the last page of section "C" and need to be specifically addressed by the vendor. It is commonly overlooked.
- Review local services and which project codes the local services pertain to.
- We use a regional laboratory to test all the urinalysis specimens, and in the near future will have our own laboratory located at the TFE.
- Section C-69 Case Staffing Conference is included in prices in Section B.
- By incorporating the provisions of Section C of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

5) Section D - Packaging and Marking

- By incorporating the provisions of Section D of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

6) Section E - Inspection & Acceptance

- By incorporating the provisions of Section E of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

7) **Section F - Deliveries of Performance**

- Specifically note capability to place federal clients in outpatient or urine surveillance without a backlog or waiting list. Read through section with regard to refusal to provide services or termination of services. Note: those programs with a religious based component must also offer or provide an alternative secular program that is the same or similar, but without any religious based component (if the vendor is fundamentally a religious based program, this needs to be specifically addressed in the vendor response).
- By incorporating the provisions of Section F of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

8) **Section G - Agreement Administration Data**

- Invoices and billing: RFP indicates the vendor must submit the original invoice to the Federal referral agency, along with *three* copies including all pertinent attachments, by the 10th of each month. Example: The July invoice is submitted by August 10th. NOTE: We are willing to accept one original signature invoice with two copies of Monthly Treatment Reports, two copies of the Urinalysis Logs and/or Breathalyzer Logs and/or Sweat Patch Logs, and one copy of the Daily Treatment Logs (different logs applicable to different BPAs).
- The two part Administrative Office invoice must be used. We will provide the vendor with the spreadsheet to utilize. However, if the vendor uses another computerized version of this invoice, it must contain all pertinent sections and it must be approved by the U.S. Pretrial Services or Probation Office.
- All vendors are encouraged to submit the invoice electronically. The vendor must submit a separate invoice to the U.S. Probation Office and the U.S. Pretrial Services Office. If another vendor piggybacks on the contract, that agency receives its own invoice.
- Section F of G-3 references "no-shows" for services. A vendor cannot bill for "no-shows." This can be built into the price for the service in the proposal. Communication of no-shows must occur between the vendor and Probation or Pretrial Services office, as required by the RFP.
- Section J of G-E indicates the vendor shall include the cost of written reports and conferences with the USPO/PSO in the prices for services.
- Section K of G-3 points out that telephone contacts between the vendor and client can not be billed separately by the vendor. These telephone contacts need to be built into the price of the RFP.
- Units of service may vary per project code. Outpatient units for mental health and substance abuse are billed in half hour units. Short Term residential and therapeutic community treatment are billed by the day or 24 hour period of time and urine collection is billed by the specimen collected.
- Vendor shall not bill us for services where the vendor has already submitted invoices or received payment from another source.

- Co-payment is set by the USPO/PSO. Vendor must maintain accurate co-payment collection records, and deduct accordingly from the invoice. Administrative fee is paid for administration of the collection of co-payment fees (need to provide bills and receipts for co-payment, keep individualized record of co-payment collection, have system in place for collection of outstanding amount, etc per Paragraph 32 of Section C.
Co-pay needs to be recorded on the Monthly Treatment Report and Daily Treatment Log, or other appropriate log.
- By incorporating the provisions of Section G of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

9) Section H - Special Agreement Requirements

- Referenced Drug Free Workplace and requirements within 30 days after award.
- By incorporating the provisions of Section H of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

10) Section I - Special Agreement Requirements

- Reminder that vendors cannot use the “judiciary” in letters of reference, etc, in such a way that it represents or implies that the judiciary prefers or endorses the services offered by the vendor.
- Vendor must provide notice in writing 30 days prior to subcontracting, and receive written approval or disapproval. It is the responsibility of the vendor to ensure the subcontract is compliant with the terms of the agreement.
- Potential extension of the BPA option years as outlined in Section I.
- By incorporating the provisions of Section I of the solicitation document into the Proposal, the Offeror is agreeing to comply with these requirements and provisions.

11) Section J-Forms & Attachment

- Attachment J.1 - vendor responsible to complete
- Attachment J.2 - vendor will receive a program plan from USPO/PSO indicating the appropriate level of services authorized for the vendor to provide. Vendor can only provide those services authorized.
- Attachment J.3 - same as J.2, except only if BOP piggybacking
- Attachment J.4 - locally modified Monthly Treatment Report
- Attachment J.5 - release form vendor must complete
- Attachment J.6 - locally modified Daily Treatment Log
- Attachment J.7 - if vendor reimbursed for travel
- Attachment J.8 - invoice which is sent electronically to vendor
- Attachment J.9 - locally modified Urinalysis Testing Log
- Attachment J.9a - locally created Sweat Patch Testing Log
- Attachment J.9b - locally created Breathalyzer Log

- Attachment J.9c - locally created Breathalyzer Instrument Log
 - failure to obtain a client's signature may result in the Federal Referral Agency not making payment
- 12) Section K - Representations, Certifications, and Other Statements of Offerors or Quoters**
- Vendor needs to fully complete Section K.1 and K.2.
- 13) Section L - Instructions, Conditions, and Notice to Offerors**
- Section A - Solicitation/Offer/Acceptance. Boxes 8 through 15 of this section MUST be completed by the vendor. Section L.1 (A) (7 & 8) incorrectly reference blocks 13A and 13 B; however, this should reflect blocks 14 and 15. If any of these boxes are left blank, the RFP can be determined to be Technically Unacceptable.
 Original and additional copies of this form must contain ORIGINAL SIGNATURES of the offeror in the block.
 - Must provide a response to every requested service item. If vendor fails to respond to a requested project code, the vendor will be technically unacceptable.
 - Average FY09 prices paid by project code are listed on the web page, and these are reflected according to catchment area.
 - Vendor must indicate if they will subcontract for the services with a "S" following the price.
 - Again a reminder the vendor should factor no shows into their unit prices.
 - EMQs are estimates only.
 - Narrative Statement (Attachment A). All requirements of the statement of work in section "C" need to be addressed as well as the mandatory requirements for Sections E, F and G in this statement. A GENERAL STATEMENT THE OFFEROR WILL COMPLY WITH THE RFP REQUIREMENTS IS NOT SUFFICIENT. The vendor should identify how the vendor will provide the services, as well as identify subcontractors and how the subcontractor will provide the services. *Provide as much detail as possible, as this will assist in determining whether the vendor has met the mandatory requirements.*
 The vendor should describe service by service how the vendor will provide the services, as well as local needs.

 Describe in detail the billing procedures and maintenance of fiscal records

 Identify and describe all emergency contact procedures

 Describe offeror's treatment philosophy and approach to providing services.

- Background Statement (Attachment B) describing experience in providing the requested services, as well as ensuring any subcontractors comply.
Copies of monitoring reports or letters of satisfactory or higher rating

Expressly state *each location* at which the offeror AND any proposed subcontractors intend to provide services - describe physical facility in detail (site must be in catchment area and available as a site at the time of submission of the RFP)

Include copies of building, state, and local licenses and inspections reports for preceding 18 months, with same for subcontractors.

Include copies of compliance with all federal, state and local fire, safety and health codes, with same for subcontractors.
- Staff Qualifications (Attachment C).
Need to complete for all staff performing services and complete Certification at bottom of form. Must also prepare for all proposed subcontractor staff performing services.
- Offeror's References (Attachment D).
Must provide 3 references from whom the offeror has provided treatment and other services identified in the RFP within the past 3 years. It was explained that references would be contacted.
- By submission of a signed proposal, the offeror is agreeing to comply with all terms and conditions of the agreement.
- Award will go to responsible offeror whose offer represents the best value after passing the technically acceptable evaluation. Evaluations and award will be completed without discussions with offerors (except clarifications).

14) Section M - Evaluation Factors for Award

- Evaluations are made on a Pass/Fail Criteria outlined in Section "M" of the RFP is used to determine if the RFP is technically acceptable.
- Once the agencies who are Technically Acceptable are determined, the life of agreement cost is calculated using the formula outlined on page M-4 of Section M. The Life of Agreement Cost will determine which agencies submitted the lowest bids.
- Once the lowest bidding 'technically acceptable' vendor is determined, on-site visits will be conducted. It was explained that site visits, discharge data and qualifications of staff are also used to determine the appropriate vendor.
- Required to submit three references with the RFP. These references will be contacted.

15) Post Award Procedures

- More than one vendor can be chosen for a BPA. If this is the case, the referrals to the vendors would be made to ensure financial equity between the entities involved.
- A Vendor Orientation will be held September 22 at 9 a.m. - 11 a.m. in the multipurpose room of the 22nd floor of the TFE for all vendors receiving an award. This training will outline all the paperwork and procedures involved.
- Referrals will be effective October 1, 2009.
- If applicable, vendors will receive supplies prior to October 1 in order to be able to provide services.
- Once vendors are selected there will be at least two monitoring visits during the initial year of the agreement.